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Adobe Acrobat DC integration with VOC

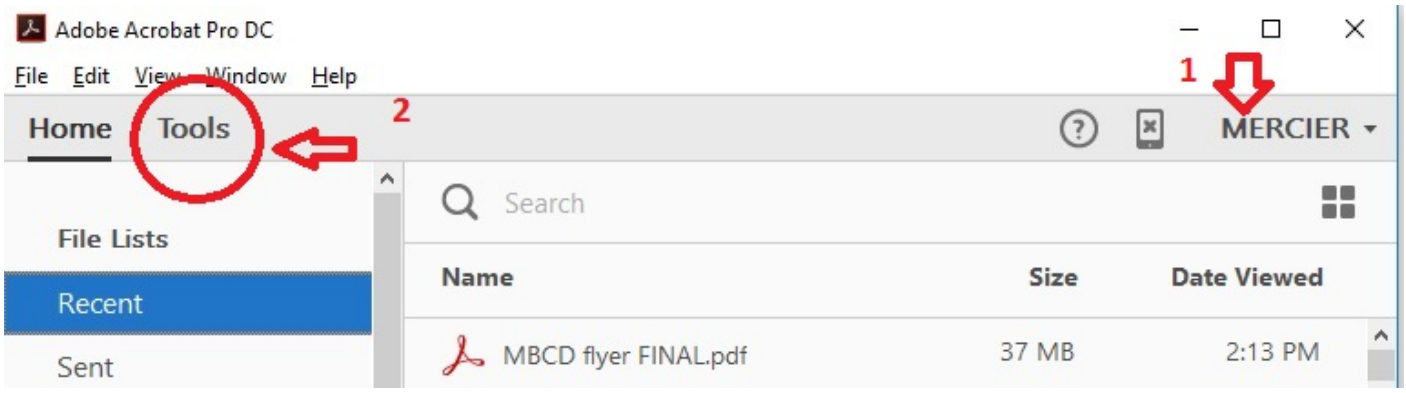
Advantage: Getting the voting paper signed and received instantly

Tool: Adobe Sign by Adobe pro DC

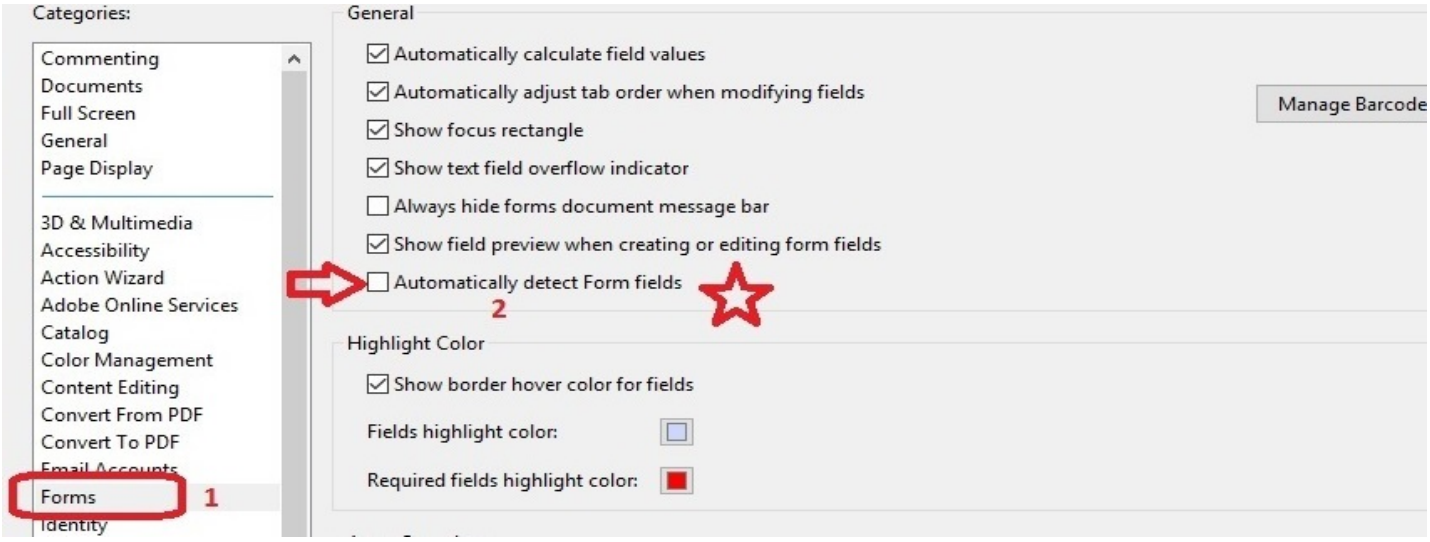
1. Open the new "VOC voting paper template" from "\Administration\ADOBE Sign templates" folder.
2. Save as in the relevant scheme folder in "Meeting" folder with the new name (Based on file name standard).
3. Fill up the empty fields - it will be one-off transition to migrate from old template to the new one. (delete unnecessary fields of the committee member table if the number of committee members is less than 8)
4. When you are done with the main Word document; save the file as PDF in the right destination.
5. Open Adobe Acrobat Pro DC
6. Check the top right corner; you should be singed in with MERCIER group account. If not, you will see a "Sign in" button instead, click on it and sign in with the following username and password:

   User name: contactus@mercierbcs.com.au

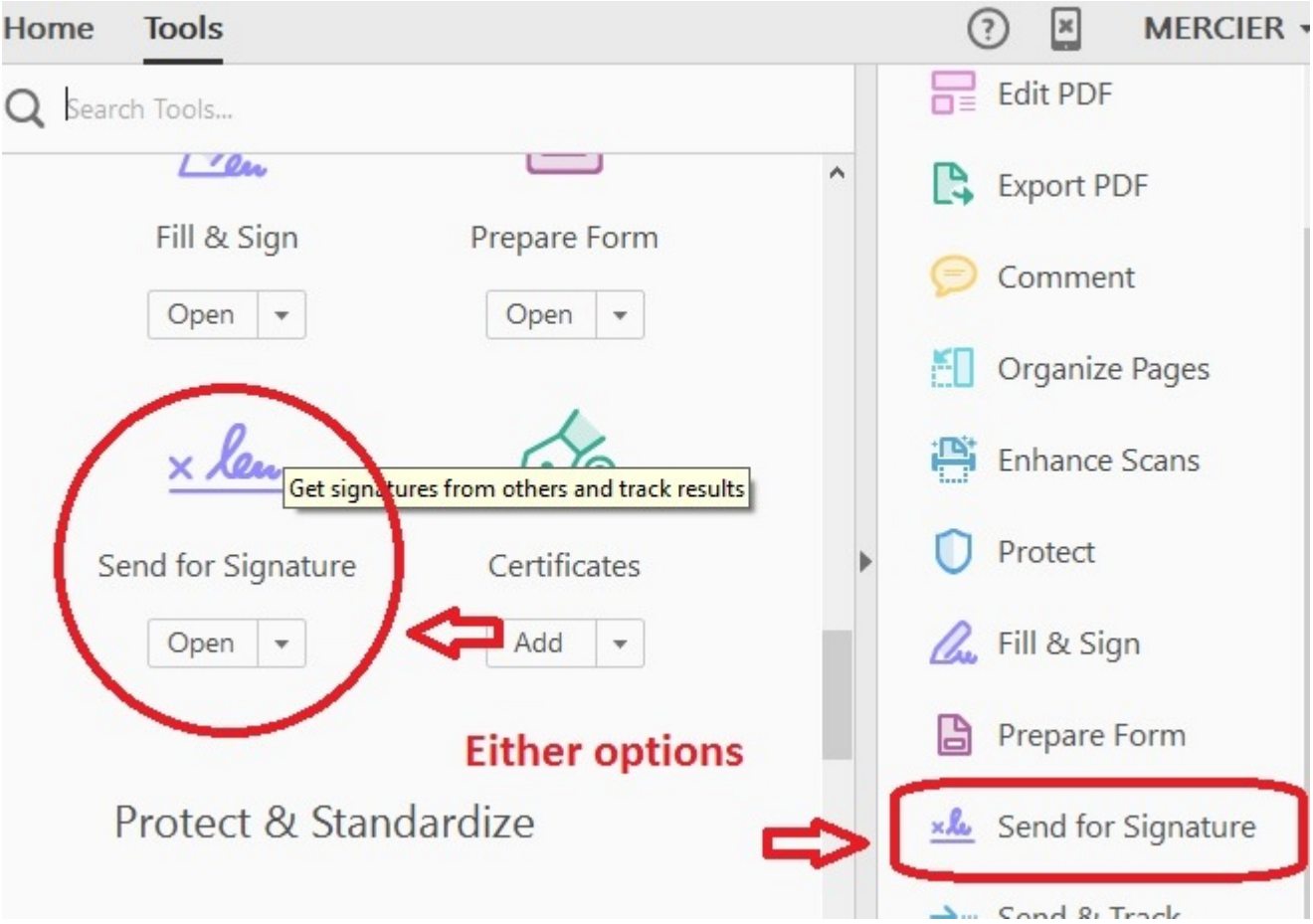
   Password: Mbcs2013z



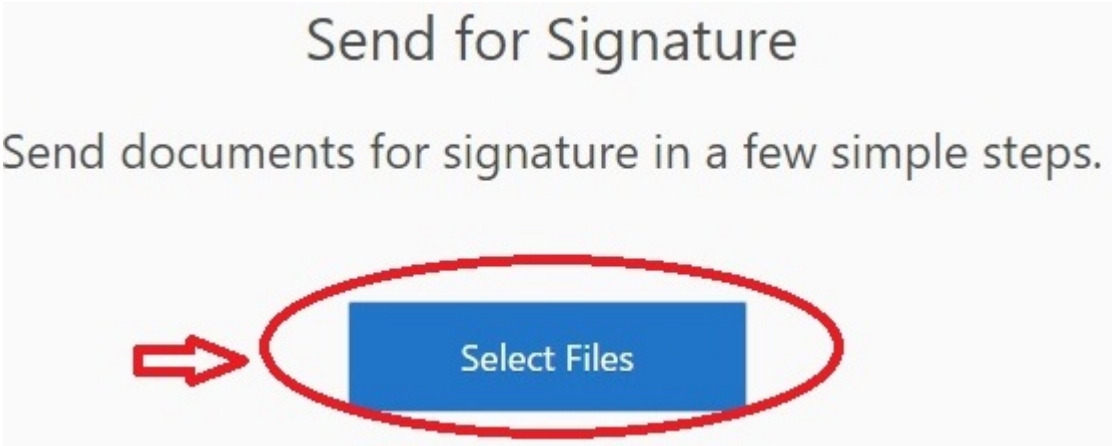
7. On the main page click on "Tools"
8. Click on "Edit" tab and choose "Preferences" ; in the left pane choose "Forms" and in the right screen, make sure that the checkbox of " Automatically detect form fields" is unchecked; press "OK"



9. Choose “Send for signature” either from right pane or the main window



10. Select the PDF file created in stage 4



11. Choose “Prepare form” in next window
12. To let committee member marking their own name in the table we use “Radio buttons” with which only one option can be selected. Follow these steps :

    12.1 On the top toolbar click once on the radio button,

    This can be also picked from the list if you right click anywhere in the document

    12.2 Scroll your pointer down in front of the chairperson name at the right end of cell

    12.3 Adjust and place the radio button,

    There will be 2 horizontal and vertical lines to help you position the box

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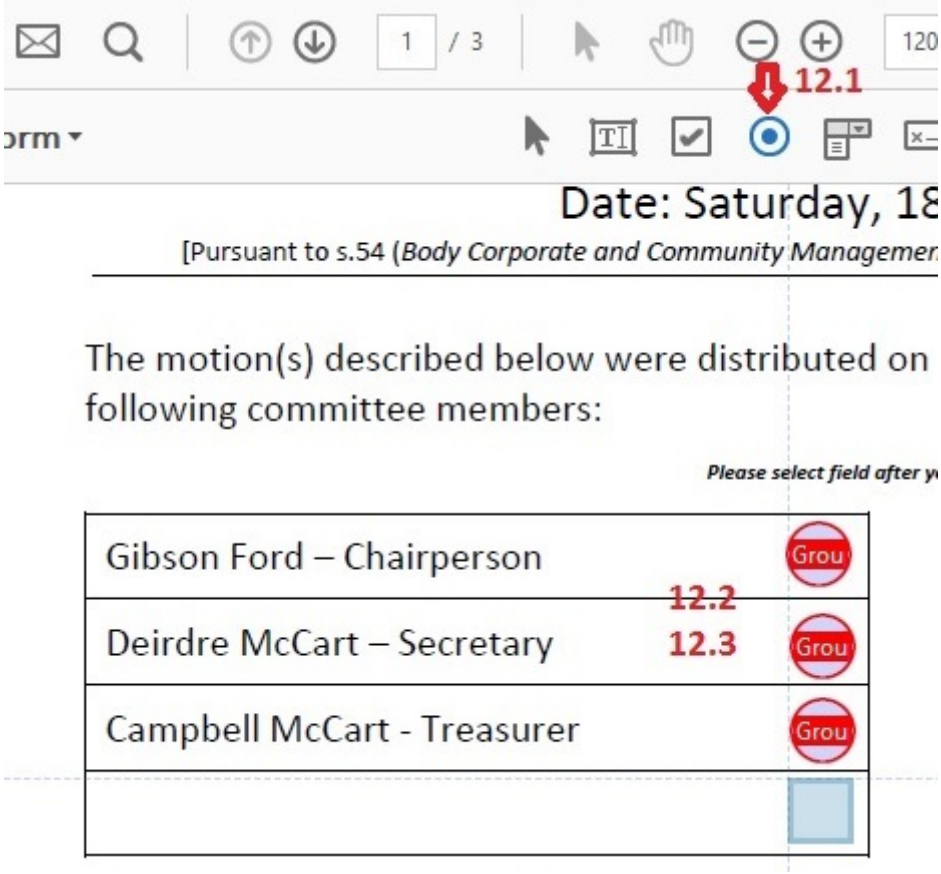

12.4 The first choice would be “Choice1” belonged to “Group#”

You might see a different group numbers which can be due to multiple files. There is no issue of having a different group numbers as long as all the choices are in the same group.

12.5 Make sure “required field” is checked

12.6 Click on “Add another button” and fill up the whole table

12.7 At the end right click on all the radio buttons , choose first option which is “Properties” and LOCK the element (this stage is not necessary but helps the form to remain consistent)

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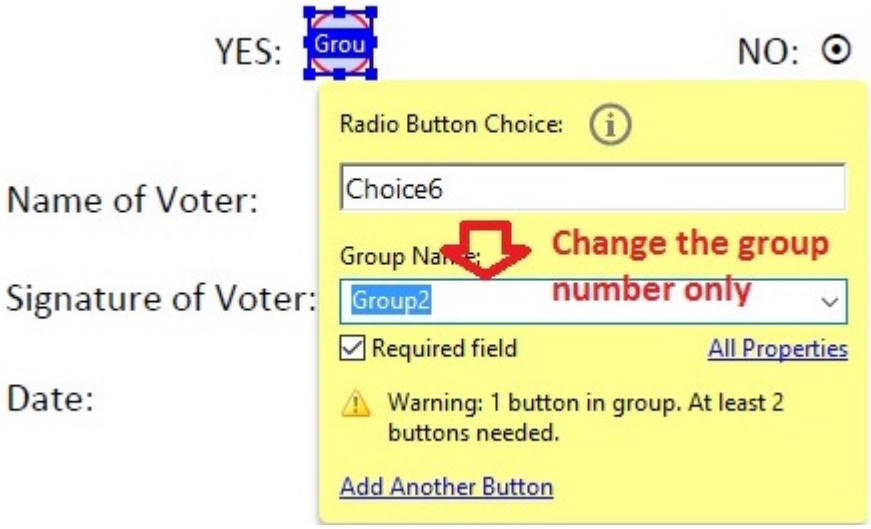
** All CHOICES in the table should belong to one group number!

13. Move to voting section, to enable the recipients vote electronically radio buttons would be used as well.

    13.1 Follow the steps 12.1 to 12.7 once again

    13.2 Place the first radio buttons on first ⦿ (this sign is just a hint to mark the place of the radio buttons)

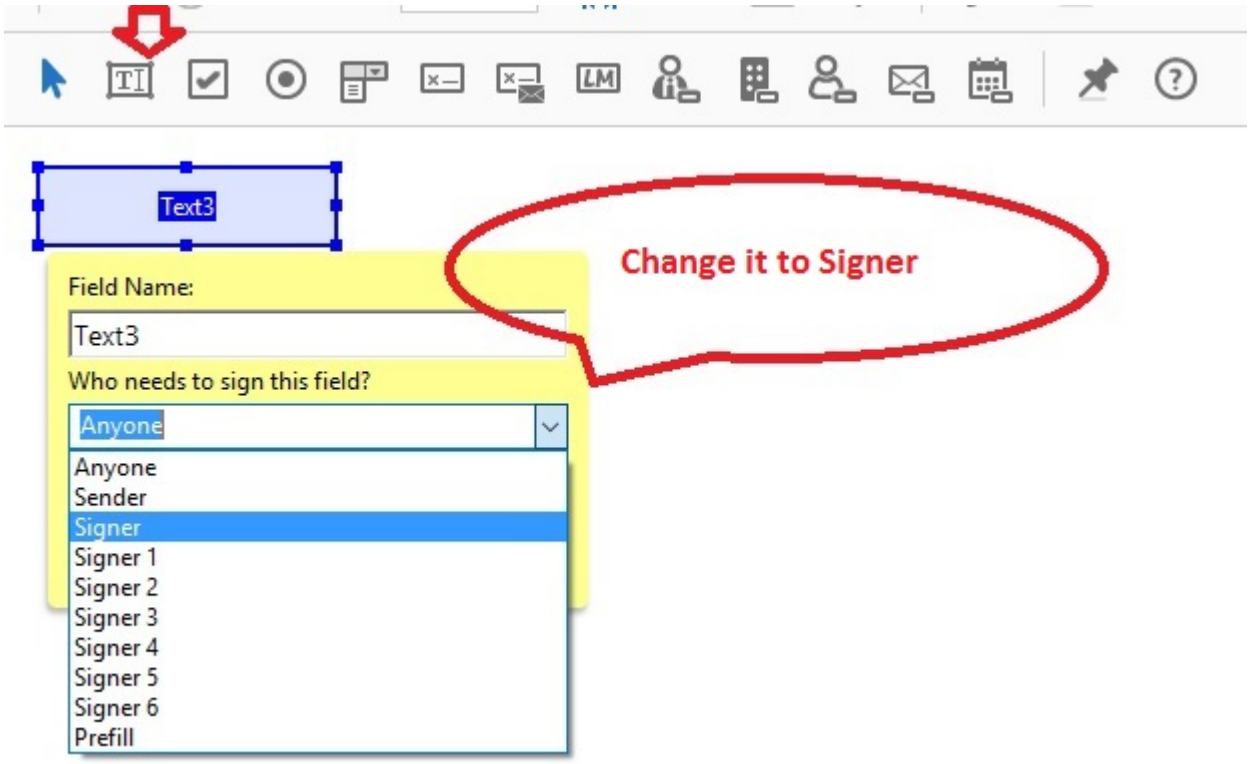
    13.3 Change the Group number manually (Example: if the name list group is GROUP3 the group number of voting section should be GROUP4)



** If there are more than one motions make sure that each motion voting section should be in a new group number.

14. Move to signature section.

    14.1. Click once on “text field” from toolbar or pick it by choosing it from right click menu and place it in front of “Name of Voter”. You might stretch the field horizontally to have enough space for long names



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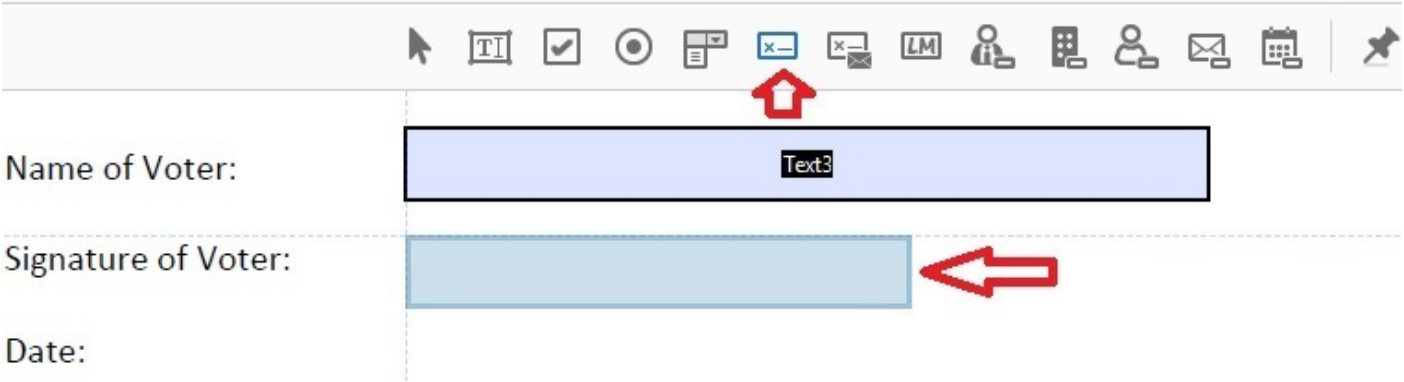
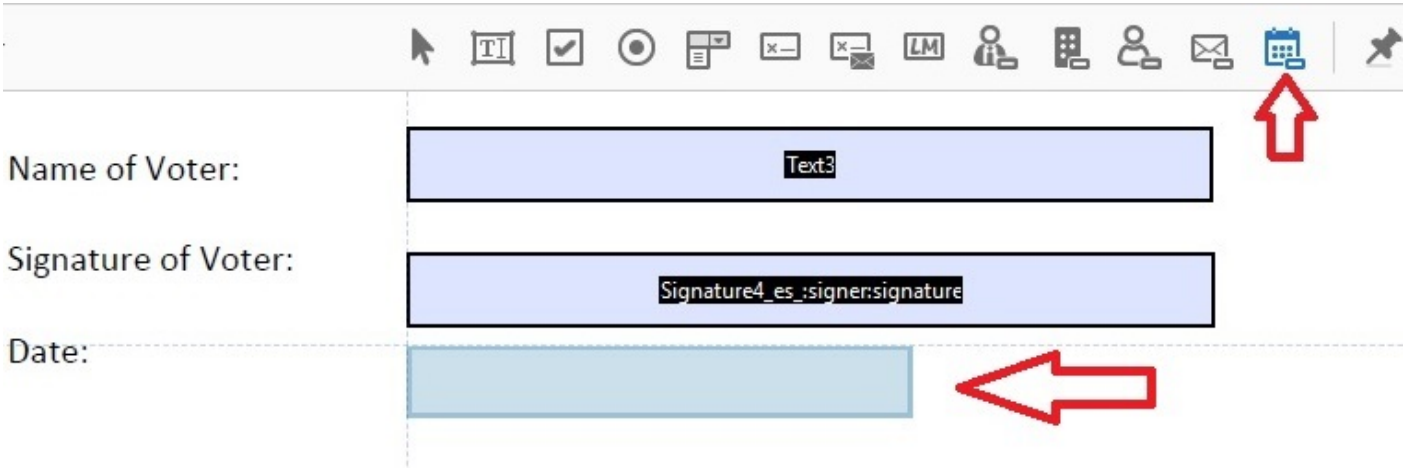
14.2. Click once on “signature field” from toolbar or pick it by choosing it from right click menu and place it in front of “Signature of Voter”.



14.3. Click once on “Date field” from toolbar or pick it by choosing it from right click menu and place it in front of “Date”.



14.4. Change the right of signing to “SIGNER” on all the fields. You can access to this anytime by right clicking on the object and choosing “Properties”.

14.5. Lock the objects (Follow stage 12.7)

15. Move to the footer of the page.

15.1. Click once on “initial field” from toolbar or pick it by choosing it from right click menu and place it in front of “Name of Voter”. You might shrink it fit into the footer

15.2. Right click on it and choose “properties”, in the Appearance tab change the font size to 7 manually.

15.3. Right click on the object, copy it and paste it on all the initial sections of the footers

15.4. Lock the objects (Follow stage 12.7) – Lock them after copying

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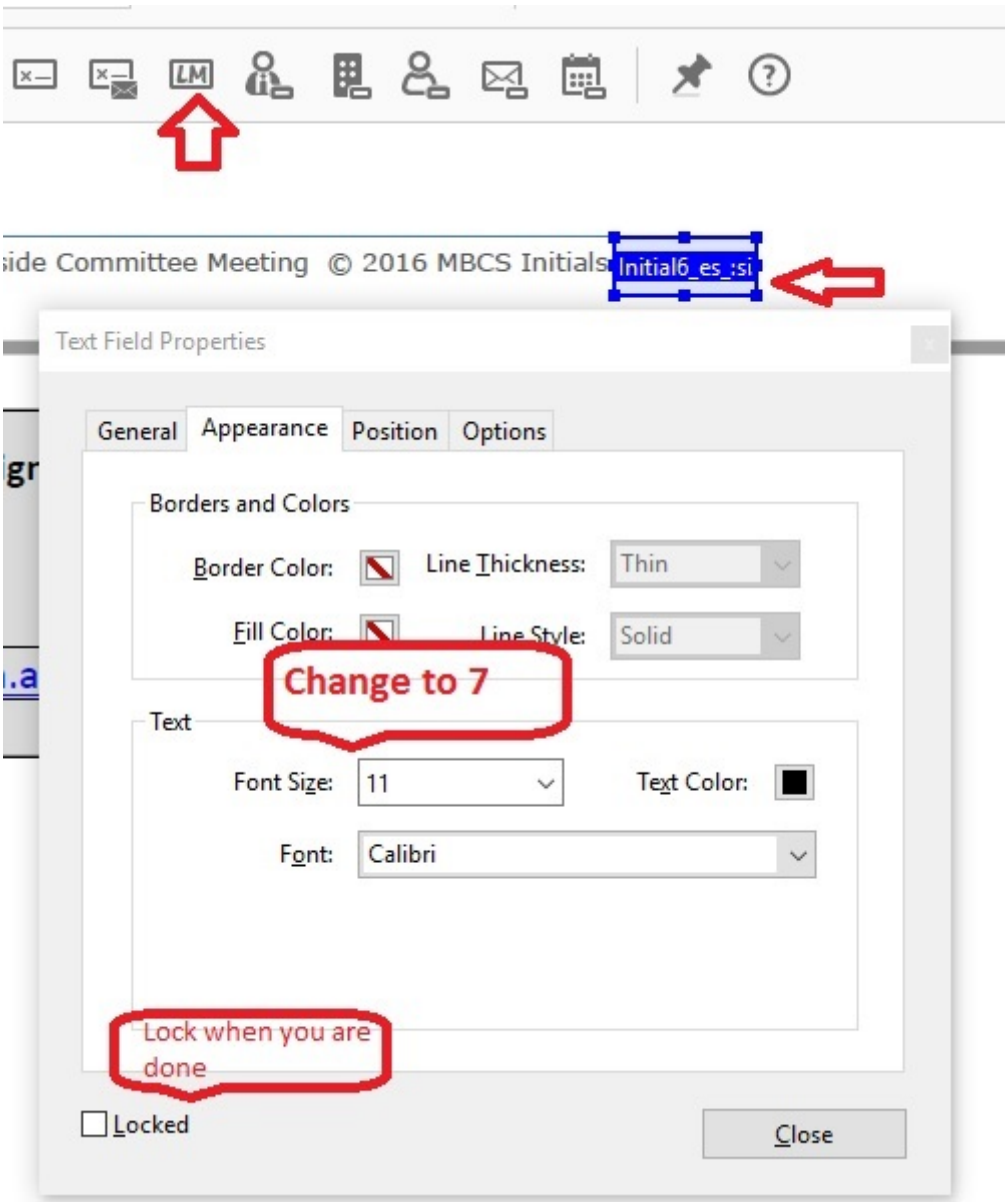
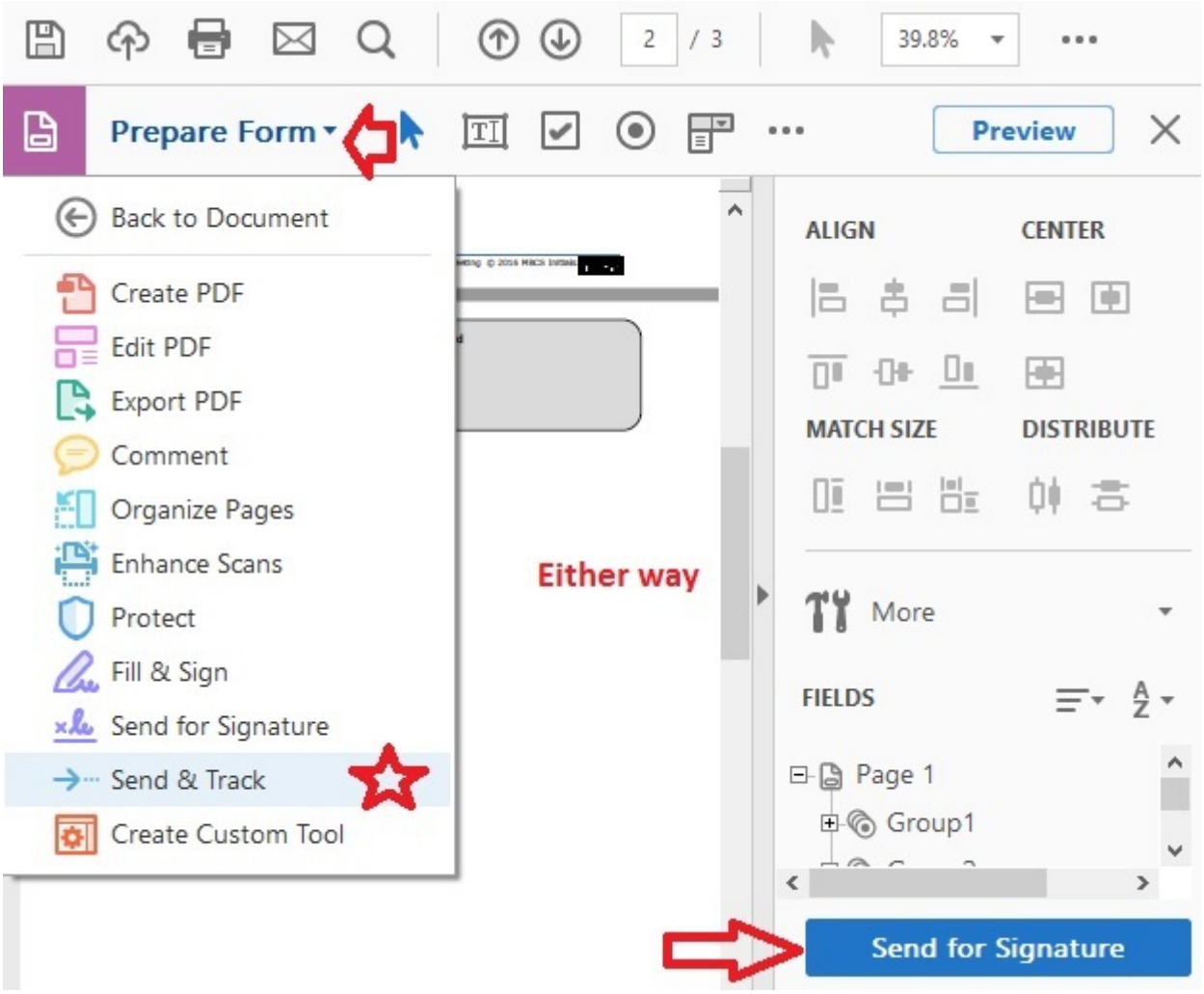
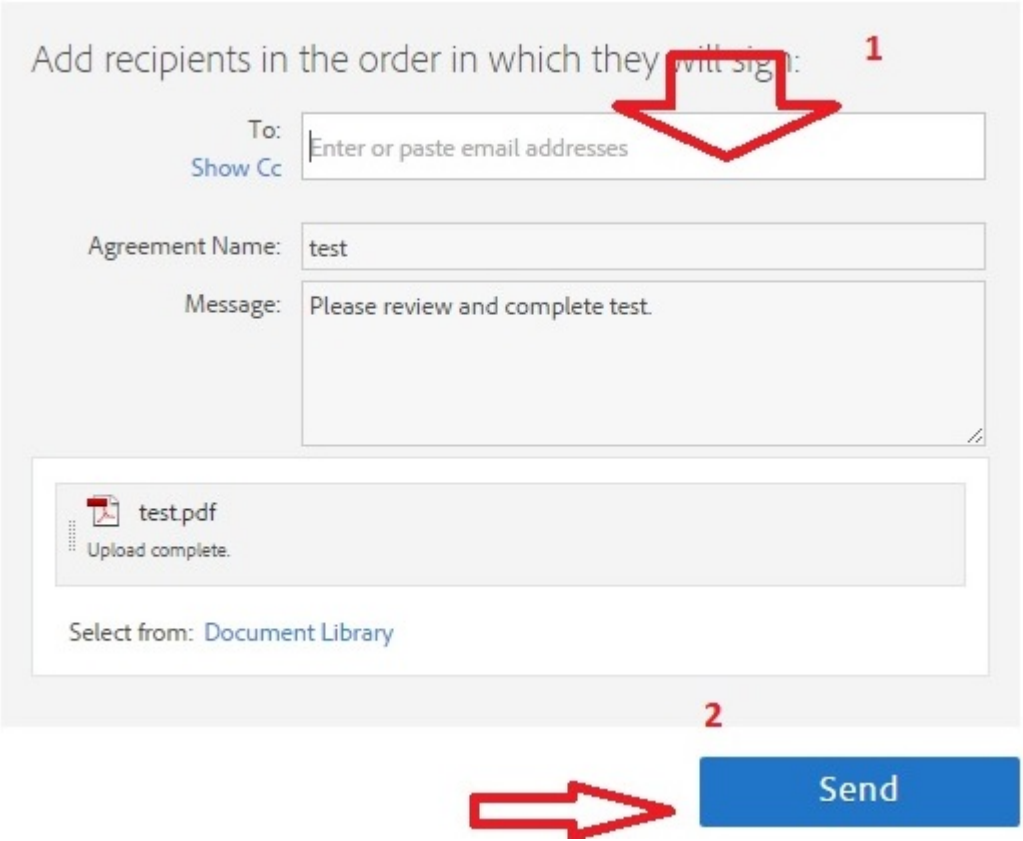


16. Double check the fields for the following:
    - 16.1 Signing and filling up the forms should be granted to the signer
    - 16.2 Group numbers of Committee members and Voting section should be different.
    - 16.3 all the fields and object should be REQUIRED field
17. Happy with the form? Time to send it out to all the recipients :
    - 17.1 On the right toolbar, press “send for signature button and in the next page choose “Ready to send” or choose “Send and Track” from the left top corner drop down list to directly reach to the last step.
    - 17.2 Wait for the file to be uploaded
    - 17.3 Enter or paste email addresses


2 / 3
39.8%
Prepare Form
Preview
Back to Document
Create PDF
Edit PDF
Export PDF
Comment
Organize Pages
Enhance Scans
Protect
Fill & Sign
Send for Signature
Send & Track
Create Custom Tool
Either way
ALIGN
CENTER
MATCH SIZE
DISTRIBUTE
More
FIELDS
Page 1
Group1
Send for Signature


Add recipients in the order in which they will sign:
1
To:
Show Cc
Enter or paste email addresses
Agreement Name:
test
Message:
Please review and complete test.
test.pdf
Upload complete.
Select from: Document Library
2
Send

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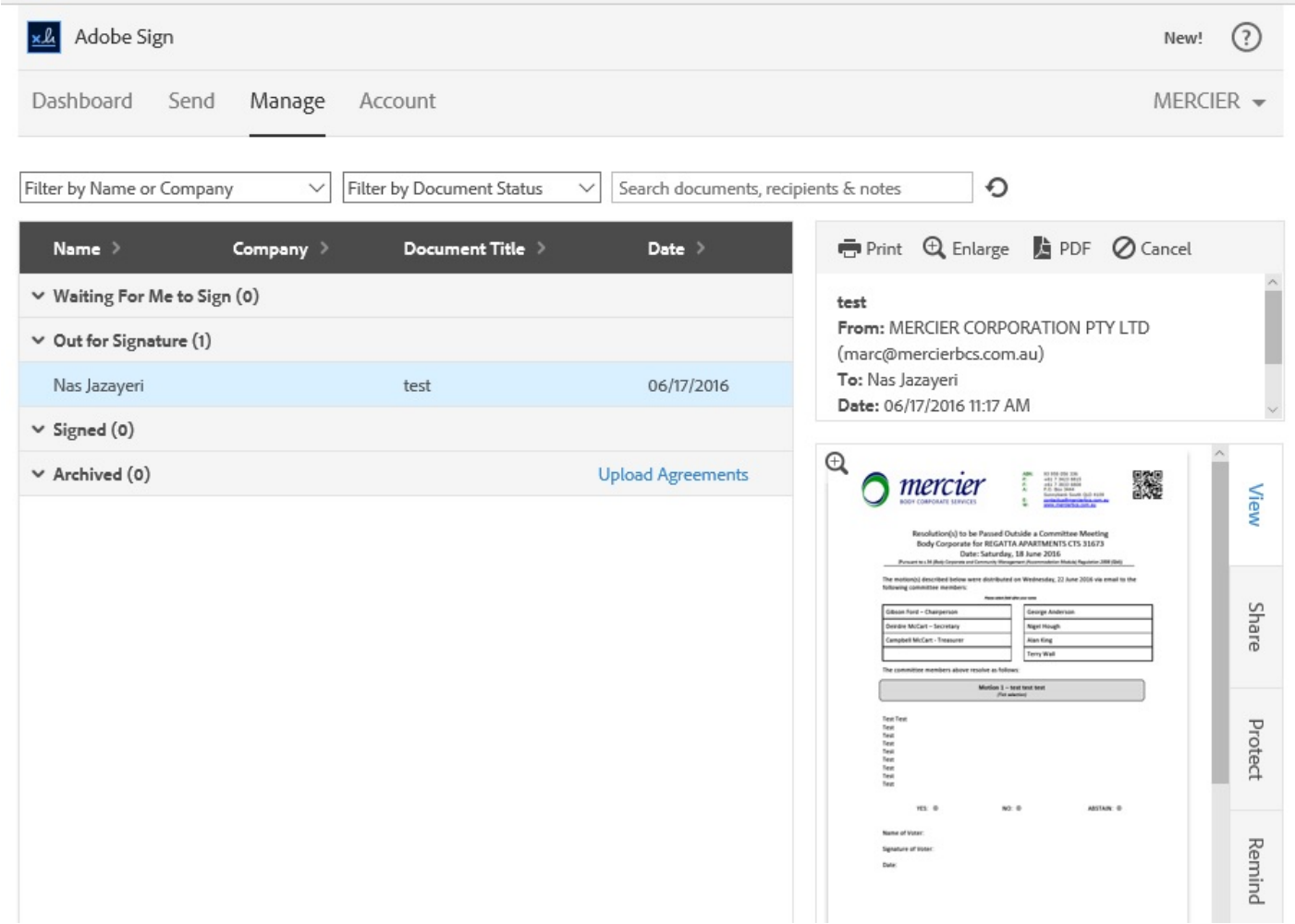
18. To manage the document and receive the signed forms:

18.1 Login to following link by your Adobe ID:

https://documents.adobe.com

18.2 Choose manage documents

18.3 You will see the list of all documents sent for signature and can track the votes.



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